# Contract Specialist Quick Reference: Create, Update & Close Contracts (Imported from PTS) https://des.diversitycompliance.com/

**What do I do as of July 1, 2016**

**Create Password and Login:**

* Go to <https://des.diversitycompliance.com/>
* Click on **Log In**
* Click on **Forgot Password**
* Enter in **email address** and click **Submit**. A temporary password will be sent to you in a few minutes
* When you receive the temporary password, click on **Log In** again
* Enter your email address as the **User Name**
* Enter in the **temporary password** and click **Login**
* You will prompted to create a **new password**

**Imported Contracts – Review the first business day of every week**

Once the contract has been imported from PTS (import scheduled weekly - every Friday after 6:00 pm), **the data will need to be reviewed on the first business day of every week and additional fields entered by the Contract Specialists**.

★= fields that will need to be entered or changed after the contract has been imported into the system

**Navigation: Home Screen🡪Dashboard🡪Contracts🡪Pending Locked In**

* Click the number next to the **Pending** **Locked In** on the dashboard.
	+ If Locked In Contracts doesn’t exist, then there are no contracts that need to be locked in at this time.
* Click on **View** to access the main page of the Contract
* Click on **Edit Contract** under the Contract Status and Actions container

**Contract Information**

* Check that the **Contract Title** is correct from PTS (***Agreement or Contract Description***)
* Check that the **Contract Number** is correct from PTS **(example: 16-125 (2-3))**
* Check that the **Contract Value** is correct from PTS (***Subtotal Agreement or Subtotal Contract***)
* Check that the **Contract Holder/Owner** is correct from PTS (***Agency Name***)
	+ ★Will default to Washington State Department of Enterprise Services, change if not the correct agency
* ★Select the **Department** by choosing Engineering & Architectural Services

**Contract Dates**

* Check that the **Award/Start Date** is correct from PTS (***B2GNow - A/E NTP Date or Contract Award Date*** )
* Check that the **(Projected) End Date** is correct from PTS (***B2GNow – Complet Phase/Final Accept or Original Comple Date)***
* Check that the **Notice to Proceed Date** is correct from PTS (*Not applicable for Agreements;* ***Const NTP Date***)
* Check that the **Final Acceptance Date** is correct from PTS (***Agree Closed Date or Final Acc Date***)
* Check that the **Substantial Completion Date** is correct from PTS (*Not applicable for Agreements****; Sub Comp Date***)

**Prime Contractor Information**

* If vendor was **found** during the import, the vendor information will default.
	+ The **Prime Compliance Contact** will default if only one contact exists in the vendor database.
		- ★If more than one, choose the correct one from the dropdown list.
		- ★If contact not listed in the dropdown, click on **Quick Add** and enter the information.
	+ The **Prime Address** will default if only one address exists in the vendor database.
		- ★If more than one, choose the correct one from the dropdown list.
		- ★If address not listed in the dropdown, click on **Quick Add** and enter the information.
* ★If vendor was **not found** during the import, Click on **Get Vendor**
	+ Enter in search data and click **Search All Matches.** If vendor found, then click on **Select Vendor**
		- * If Vendor not found, see **Quick Reference: Create A Vendor**
	+ The **Prime Compliance Contact** will default if only one contact exists in the vendor database. If more than one, choose the correct one from the dropdown list.
		- If contact not listed in the dropdown, click on **Quick Add** and enter the information.
	+ The **Prime Address** will default if only one address exists in the vendor database. If more than one, choosethe correct one from the dropdown list.
		- If address not listed in the dropdown, click on **Quick Add** and enter the information.

**Organization Contacts**

* Check that the **Buyer/Project Manager** is Department of Enterpise Services

**Contract Settings**

* ★Enter in the **Diversity Goals** from the Prime Contractors Inclusion Plan (Enter zero, if no goal for that diversity type(s))
	+ > 1 million for Construction Contracts
	+ > 350,000 for Agreements
* ★Select the **Contract Type** from the dropdown list
* ★Select he **Contract Category** from the dropdown list
* Check that the **Legislative District** is correct from PTS (***Leg District***)
	+ ★Enter if none exists

**Compliance Audit Settings**

* ★Select the **Compliance Officer** from the dropdown list
	+ The Compliance Officer will default to the Contract Specialist. **This needs to be changed to the Project Manager assigned to this contract.**
* ★Select the **Secondary Compliance Officer** from the dropdown list
	+ This should be the Contract Specialist that is assigned to this contract.

**Contract Files**

* ★Click on **General Attached Files**
	+ Browse Files to find the **Inclusion Plan** and attach
	+ Attach other documents, as needed

**Click on Review - review the record and if need to make changes, click Edit. To save the record, click Save.**

If you are not finished creating your contract and you need to navigate to another part of the system, go to the **left hand navigation bar** and **right click** on the screen you want to navigate to. Then click on **Open in New Tab**. This will open a new screen and also leave your contract screen open for you to finish completing. Your contract information will not be saved until you enter the required fields and click on Review and then Save.

**Update A Contract/Change Order**

When a contract is imported from PTS to the system, the system will look at the contract number first to determine if the contract already exists. If the contract does exist, then the system looks at the Contract Value and End Date to determine if either of those fields have changed from what was previously imported. If either of those fields has changed, then the system creates a Change Order and that process must be followed in order to accept the new value. The system does not look to see if any other fields change so those will have to be updated manually.

**Navigation: Home Screen🡪Dashboard🡪Contract Summary**

**Contract Information**

* Click the number next to the **Value Change** or **End Date Change** on the dashboard.
	+ If Value Change or End Date doesn’t exist, then there are no contracts that need to be updated at this time.
* Click on **View** to access the main page of the Contract
* **For Contract Value Changes**
	+ Click **Update Value** and you will be redirected to the Change Order form.
	+ Enter the **Change Order Title**, **Change Order Date**, and **Change Order Note.**
		- Copy and paste from PTS the CO or FA Description or the Amendment Description into the Change Order Note field
	+ Update the **Total Contract Amount** and **Adjust the Goal,** if necessary.
	+ Click on Review and then Save
* **For End Date changes**
	+ Click **Update End Date** and you will be redirected to the Change Order form.
	+ Update the End Date and provide Notes, if applicable.
	+ Click on **Review** and then **Save**

If fields have changed other than the Contract Value or End Date:

* Click on **Main** tab
* Click on **Edit Contract** in the Contract Status box
* Edit fields other than the Contract Value and End Date
* Click on **Review** and then **Save**

**Closeout A Contract**

When a contract or agreement status is changed to closed in PTS or PM contacts you to close the contract, begin this workflow. At this point, the payments have been reported and confirmed, discrepancies have been resolved by the PM and the contract is complete, you can closeout the contract in the system.

**Navigation: Home Screen🡪Search🡪Contracts**

**Contract Information**

* Enter the **Contract Number** and Click on **Search All Matches**
* Click on **Contract Number**
* Click on **Edit Contract**
* Verify all the information in the system matches PTS
	+ Click **Review** and **Save** if any changes were made
* Click on **Closeout** tab
* Enter in the **Close Date**
* Click on **Close Out Contract**
* Click **OK** to confirm you want to close the contract

**Password Resets**

**Change Your Password**

**Navigation: Home Screen🡪Tools**

* Enter old password
* Enter new password

**Forgot Your Password**

**Navigation: System Access Login🡪Forgot Password**

* Enter email address in the field and click Submit
* A temporary password is sent and you will be prompted to change their password upon login.